

## SCDLMCE7

Develop, implement and review strategic business plans that support the continuing development and viability of care service provision



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### Overview

This standard identifies the requirements when developing strategic business plans that support the continuing development and viability of care services. It includes identifying and using performance indicators and measurement methods to evaluate the achievement of objectives and success of the business plan.

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### Performance criteria

#### Develop a strategic business plan that supports the continuing development and viability of the service provision

*You must be able to:*

- P1 lead the development of a clear, achievable and inspiring vision which sets out the direction of the service provision
- P2 consult with **individuals, others** and those providing **governance** to identify the main purpose, aims and objectives of the service provision
- P3 consult with individuals, others and those providing governance to prioritise strategic objectives for the service provision that are consistent with its' purpose and vision and support its' continuing development and **viability**
- P4 **critically evaluate** how the vision of the service provision, its' purpose, aims and objectives, contribute to the achievement of positive outcomes for individuals
- P5 critically evaluate demographics, trends and changes that are likely to have an impact on the service provision
- P6 **critically analyse market intelligence** to identify risks and opportunities for the continuing development and viability of the service provision in the short, medium and long term
- P7 analyse the implications of **changing internal needs** on the continuing development and viability of the service provision in the short, medium and long term
- P8 identify legislative and regulatory requirements and performance indicators that need to be met by the service provision
- P9 identify the unique aspects of the service provision
- P10 research potential markets and business opportunities for the service provision
- P11 identify resource implications for potential markets and business development opportunities
- P12 identify potential sources of funding for potential markets and business development opportunities
- P13 critically analyse the risks and benefits of potential markets and business development opportunities
- P14 develop a business risk assessment strategy to ensure the future development and viability of the service provision
- P15 appraise options for a strategic business plan in terms of costs, risks, benefits and outcomes for the short, medium and long term
- P16 balance new ideas with tried and tested solutions for operational planning
- P17 work with individuals, others and those providing governance to

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- develop a strategic business plan for the service provision
- P18 ensure that the plan is flexible and open to change
- P19 identify the resources required to achieve the objectives set within the strategic business plan and to deliver a safe and effective service provision
- P20 consult with individuals, others and those involved in the governance of the service provision to develop performance indicators for the strategic business plan
- P21 consult with individuals, others and those involved in the governance of the service provision to develop measures and methods for monitoring and evaluating the strategic business plan
- P22 ensure that individuals, others and those providing governance can see how the strategic business plan links to the overall vision of the service provision and the governance within which it operates
- P23 balance the needs and expectations of individuals, others and those involved in the governance of the service provision with what can be achieved in the strategic business plan
- P24 ensure that the strategic business plan complies with legislative, regulatory and governance requirements
- P25 identify appropriate data collection methods for the objective measurement of the achievement of the strategic business plan

#### **Implement, monitor and review the strategic business plan for the service provision**

##### *You must be able to:*

- P26 articulate a vision for the service provision that generates excitement, enthusiasm and commitment
- P27 ensure that individuals, key people and others can see how strategic business plans link to the overall vision of the service provision and the governance within which it operates
- P28 clarify to individuals, key people and others how the delivery of a high quality service and the achievement of positive outcomes is reflected in the vision for the service provision
- P29 delegate responsibilities for achieving individual and team objectives that will contribute to the strategic objectives set out in the business plan
- P30 allocate resources for the achievement of objectives for the strategic business plan
- P31 take action when resources are not being used effectively and efficiently
- P32 ensure that workers understand their roles, responsibilities and accountabilities for achieving allocated objectives
- P33 encourage workers to take the lead for allocated objectives and

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- make decisions within agreed boundaries
- P34 ensure that workers are supported to achieve their allocated objectives
- P35 provide support to workers through difficulties and challenges in meeting their objectives
- P36 create a culture that encourages and recognises creativity and innovation
- P37 lead the implementation of agreed methods to monitor and measure the achievement of allocated objectives
- P38 lead the implementation of systems, procedures and practice to monitor and measure progress against agreed performance indicators for the achievement of strategic plans
- P39 lead the implementation of systems, procedures and practice to collect **quantitative** and **qualitative** information and data on the achievement of strategic plans
- P40 ensure that individuals, **key people** and others are supported to contribute to the monitoring and measuring of the achievement of strategic plans against agreed performance indicators
- P41 ensure the continuous collection of information and data to provide a baseline against which performance can be measured and trends identified
- P42 monitor market intelligence and changing internal needs to ensure that risks and new market opportunities are identified for the continuing development and viability of the service provision
- P43 critically analyse the quantitative and qualitative information and data collected from monitoring activities
- P44 interpret the analysis of the data collected to report on strategic objectives that have been met, areas for improvement, identified market opportunities and risks for the continuing development and viability of the service provision
- P45 identify changes required to make improvements, minimise risks and take advantage of new market opportunities
- P46 identify the resources required to implement recommended changes
- P47 consult with individuals, others and those involved in the governance of the service provision to revise the business plan to address risks and areas for improvement and take advantage of new market opportunities
- P48 ensure that workers are recognised for their contribution to the achievement of the strategic business plan and the overall vision of the service provision

#### **Critically evaluate systems, procedures and practice used for strategic**

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### **business planning**

*You must be able to:*

- P49 critically analyse information from all sources to evaluate the effectiveness of systems, procedures and practice for business planning
- P50 identify systems, procedures and practice that positively contribute to meeting the vision and purpose of the service provision
- P51 identify systems, procedures and practice that need to be changed to meet the business planning requirements of the service provision
- P52 implement changes to systems, procedures and practice to meet the business planning requirements of the service provision

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### Knowledge and understanding

#### Rights

*You need to know and understand:*

- K1 legal and work setting requirements on equality, diversity, discrimination and rights
- K2 your role in developing and maintaining systems, procedures and practices which promote individuals' rights, choices, wellbeing and active participation
- K3 your duty to report any acts or omissions that could infringe the rights of individuals
- K4 how to **critically evaluate** and take informed action against discrimination
- K5 the rights that individuals have to make complaints and be supported to do so
- K6 how to ensure that individuals are informed about the service they can expect to receive
- K7 your role in developing and maintaining systems, procedures and practices which ensure that individuals have access to information about themselves in a format they can understand
- K8 conflicts and dilemmas that may arise in relation to rights and how to address them

#### Your practice

*You need to know and understand:*

- K9 legislation, statutory codes, standards, frameworks and guidance relevant to your work, your work setting and the content of this standard
- K10 your own background, experiences and beliefs that may have an impact on your practice
- K11 your own roles, responsibilities and accountabilities with their limits and boundaries
- K12 the roles, responsibilities and accountabilities of others with whom you work
- K13 how to access and work to procedures and agreed ways of working
- K14 the meaning of person-centred/child centred working and the importance of knowing and respecting each person as an individual
- K15 the prime importance of the interests and well-being of the individual
- K16 the individual's cultural and language context
- K17 how to build trust and rapport in a relationship
- K18 how your **power and influence** as a leader and manager can

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- impact on relationships
- K19 the role of independent representation and advocacy for individuals
- K20 how to work in ways that promote active participation and maintain individuals' dignity, respect, personal beliefs and preferences
- K21 how to work in ways that achieve positive outcomes for individuals
- K22 how to manage resources to deliver services that meet targets and achieve positive outcomes for individuals
- K23 how to distinguish between **outputs** and **outcomes**
- K24 how to work in partnership with individuals, key people and others
- K25 how to identify and manage ethical conflicts and dilemmas in your work
- K26 how to challenge and address poor practice
- K27 how to address concerns and complaints
- K28 how and when to seek support in situations beyond your experience and expertise
- K29 the nature and impact of **factors that may affect the health, wellbeing and development of individuals** you care for or support
- K30 theories underpinning our understanding of human development and factors that affect it

### Personalisation and resources

*You need to know and understand:*

- K31 how to critically evaluate evidence and knowledge based theories and models of good practice about empowerment and citizen directed services
- K32 how to identify and promote the potential of individuals to use their personal strengths and resources to achieve change
- K33 the value and role of family networks, communities and groups in achieving positive outcomes, and ways to develop them
- K34 the nature of **personalisation** and personalised services, including self directed support
- K35 the range of resources available within informal networks, within the wider community, through formal service provision and through innovation
- K36 how assistive technology can be used to support the independence of individuals
- K37 how to lead, manage and support others to plan, deliver and review personalised services with individuals

### Continuing professional development

*You need to know and understand:*

- K38 principles of reflective practice and why it is important

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- K39 your role in developing the professional knowledge and practice of others
- K40 how to promote **evidence based practice**
- K41 methods of managing performance to meet targets and achieve positive outcomes
- K42 how to assess performance
- K43 how to provide constructive feedback to others on their practice and performance
- K44 how to address performance that does not meet required standards
- K45 how to use supervision to support the practice and performance of others
- K46 how to use appraisal to support the practice and performance of others
- K47 systems, procedures and practices for managing workloads
- K48 methods for delegating work

### Communication

*You need to know and understand:*

- K49 factors that can affect communication and language skills and their development in children, young people or adults
- K50 methods to promote effective communication and enable individuals to communicate their needs, views and preferences
- K51 factors that can affect communication within and between organisations
- K52 methods to promote effective communication within and between organisations

### Health and Safety

*You need to know and understand:*

- K53 legal and statutory requirements for health and safety
- K54 your work setting policies and practices for monitoring and maintaining health, safety and security in the work environment

### Safe-guarding

*You need to know and understand:*

- K55 legislation and national policy relating to the safe-guarding and protection of children, young people and adults
- K56 the responsibility that everyone has to raise concerns about possible harm or abuse, poor or discriminatory practices
- K57 indicators of potential harm or abuse
- K58 how and when to report any concerns about harm or abuse, poor or discriminatory practice, resources or operational difficulties

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- K59 what to do if you have reported concerns but no action is taken to address them
- K60 local systems and multi-disciplinary procedures that relate to safeguarding and protection from harm or abuse
- K61 how to support others who have expressed concerns about harm or abuse

#### Multi-disciplinary working

*You need to know and understand:*

- K62 the purpose of working with other professionals and agencies
- K63 the remit and responsibilities of other professionals and agencies involved in multi-disciplinary work
- K64 features of multi-disciplinary and interagency communication
- K65 how different philosophies, principles, priorities and codes of practice can affect partnership working

#### Handling information

*You need to know and understand:*

- K66 legal requirements, policies and procedures for the security and confidentiality of information
- K67 legal and work setting requirements for recording information and producing reports within timescales
- K68 principles of confidentiality and when to pass on otherwise confidential information
- K69 how to support the effective sharing of information to achieve positive outcomes for individuals
- K70 how to record written information with accuracy, clarity, relevance and an appropriate level of detail
- K71 how to use evidence, fact and knowledge-based opinion to support professional judgements in records and reports
- K72 how and where electronic communications can and should be used for communicating, recording and reporting

#### Leading and managing practice

*You need to know and understand:*

- K73 how to **critically analyse** theories about **leadership** and **management**
- K74 standards of practice, service standards and guidance relating to the work setting
- K75 national and local initiatives to promote the well-being of individuals
- K76 models of practice for the use of early interventions
- K77 lessons learned from government reports, research and inquiries

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into serious failures of health or social care practice and from successful interventions

- K78 methods of supporting others to work with and support individuals, key people and others
- K79 how to lead and manage practice that achieves positive outcomes for individuals
- K80 methods of supporting others to recognise and take informed action against discrimination
- K81 how to develop systems, practices, policies and procedures
- K82 how to implement, monitor and evaluate systems, practices, policies and procedures
- K83 how to promote the services and facilities of your work- setting
- K84 techniques for problem solving and innovative thinking
- K85 how to motivate others
- K86 how to critically evaluate evidence and knowledge based theories and models of good practice about change management
- K87 how to use change management techniques

### Risk management

*You need to know and understand:*

- K88 how to critically evaluate principles and frameworks of risk assessment and risk management
- K89 principles of positive risk-taking
- K90 how to lead others to develop practice that supports positive risk-taking

### Managing people

*You need to know and understand:*

- K91 legal and work-setting requirements for **employment practices**
- K92 internal and external governance arrangements for the work-setting
- K93 factors that can lead to pressures on the service, individual and team performance
- K94 how to manage time, resources and workload of self and others
- K95 how to manage team dynamics
- K96 how to create a culture that promotes openness, creativity and problem solving
- K97 how to create a culture that supports people to embrace change

### Specific to this NOS

*You need to know and understand:*

- K98 how to critically evaluate theories, methods and models of business

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- K99 planning, performance management, quality assurance and control procedures, criteria, methods and indicators relevant for the performance measurement of the service provision including regulatory and registration requirements
- K100 how to collect, critically analyse and interpret quantitative and qualitative data that contributes to performance management
- K101 business models and tools that support the identification of strengths, weaknesses, opportunities and threats for the service provision
- K102 social, political, economic and technological trends and changes that may impact upon the service provision
- K103 the importance of encouraging and empowering workers to take the lead and ways in which this can be achieved
- K104 how to select and apply different methods for encouraging, motivating and supporting others and recognising achievements
- K105 the importance of short, medium and long term planning to the success of the service provision
- K106 principles of strategic management and business planning
- K107 the importance of creativity and innovation in strategic leadership and management
- K108 how to delegate responsibilities and allocate resources to support a strategic plan
- K109 how to identify sustainable resources and ensure their effective use to support a strategic business plan
- K110 how to identify different markets to expand and develop the service provision

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### Additional Information

#### Scope/range related to performance criteria

The details in this field are explanatory statements of scope and/or examples of possible contexts in which the NOS may apply; they are not to be regarded as range statements required for achievement of the NOS

**Changing internal needs** could include the changing support needs of individuals who access the service; organisational restructures; staff composition

**Critically analyse** is to examine something closely such as a policy, procedure, theory, complex situation, problem or an approach to practice – identifying the parts or issues that contribute to the whole product, situation or idea and determining how these different parts affect the quality of the whole product or how the individual issues affect the overall situation

Critical analysis involves a weighing-up of the factors concerned, for their contribution of strengths / weaknesses or advantages / disadvantages of a product or in a situation. Critical analysis is part of the process of understanding issues and developing original and creative responses

**Critically evaluate** is to weigh arguments for and against something, assessing all evidence, this could relate to factors such as models of care service delivery, policy development, theories, approaches to practice

Critical evaluation requires a weighing up and making judgements on factors such as currency, relevance, validity, outcomes, cost, sustainability, risk, and fitness-for-purpose of a product or a service against other products, services or ideas, using relevant criteria to frame the evaluation and inform decision-making

**Governance** the way in which the provision is governed and directed as required by the organisation, legislation, regulation, standards, local and national guidelines and policies

The **individual** is the person you support or care for in your work

**Key people** are those who are important to an individual and can make a difference to his or her well-being. Key people may include family, friends, carers and others with whom the individual has a supportive relationship

**Market intelligence** would include: trends in demand; competition; technology; changing methods of purchasing and providing services relevant to the service provision

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**Others** are workers that you manage, your colleagues and other professionals whose work contributes to the individual's well-being and who enable you to carry out your role

**Qualitative** subjective data that describes an individual's or group's thoughts and feelings about a topic, process, initiative or aspect of the service or provision. It will include descriptive accounts elicited from individuals, focus groups, interviews and consultations

**Quantitative** numerical and statistical data collected about a topic, process, initiative or aspect of the service or provision

**Viability** would include the ability of the provision to sustain its' activities in terms of financial, human, physical and environmental requirements and services in both rapidly changing and planned circumstances

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### Scope/range related to knowledge and understanding

The details in this field are explanatory statements of scope and/or examples of possible contexts in which the NOS may apply; they are not to be regarded as range statement required for achievement of the NOS.

**All knowledge statements must be applied in the context of this standard.**

**In relation to all knowledge statements you need to know and understand the specified areas of knowledge and be able to critically apply the knowledge and understanding in your leadership and management practice**

**Critically analyse** is to examine something closely such as a policy, procedure, theory, complex situation, problem or an approach to practice – identifying the parts or issues that contribute to the whole product, situation or idea and determining how these different parts affect the quality of the whole product or how the individual issues affect the overall situation

Critical analysis involves a weighing-up of the factors concerned, for their contribution of strengths / weaknesses or advantages / disadvantages of a product or in a situation. Critical analysis is part of the process of understanding issues and developing original and creative responses

**Critically evaluate** is to weigh arguments for and against something, assessing all evidence, this could relate to factors such as models of care service delivery, policy development, theories, approaches to practice

Critical evaluation requires a weighing up and making judgements on factors such as currency, relevance, validity, outcomes, cost, sustainability, risk, and fitness-for-purpose of a product or a service against other products, services or ideas, using relevant criteria to frame the evaluation and inform decision-making

**Employment practices** should include recruitment, performance management, disciplinary procedures, grievance procedures

**Evidence based practice** uses systems, processes and 'practice wisdom' that has been proved to be effective in supporting the achievement of positive outcomes. Evidence may have been drawn from a variety of sources: research, both formal and informal, and the views and opinions of individuals, key people and those involved in the delivery of care services

**Factors that may affect the health, wellbeing and development** may include adverse circumstances or trauma before or during birth; autistic

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spectrum disorder; dementia; family circumstances; frailty; harm or abuse; injury; learning disability; medical conditions (chronic or acute); mental health; physical disability; physical ill health; poverty; profound or complex needs; sensory needs; social deprivation; substance misuse

**Leadership** is the ability to provide strategic direction and a sense of purpose. Effective leaders create a sense of trust, confidence and belief, inspiring people to adopt the values and behaviours they promote. They are innovative, creative and motivating

**Management** is the ability to set the operational direction and organise the effective running of the service provision to meet the overall service needs including ethical, legislative, regulatory and organisational requirements. Effective managers facilitate and organise resources in order to optimise the performance of others, allowing them to carry out tasks and achieve goals efficiently and effectively. They provide clarity and accountability that enable teams to meet their objectives

**Outcomes** are the changes or differences that individuals or care services are trying to achieve. Hard outcomes are changes that are clear and obvious, or those that involve a visible change in people's behaviour or circumstances. Soft outcomes are changes that are less easy to observe and measure, or those that involve more subtle changes inside people such as a change in someone's attitude, sense of well-being or how they see or feel about themselves

**Outputs** are the tangible products, services or facilities that are a result of organisational activities or the activities of those involved in the delivery of the service provision. Outputs may be used to achieve outcomes

**Personalisation** can be defined as 'changing the power balance so that each person really does have choice and control over the care services that they want. From being a recipient of services, individuals become involved in selecting and shaping the services they use'. Personalisation is a social care approach that encompasses citizen-directed support; self-directed support; the use of direct payments or personal budgets; the provision of accessible information and advice on care and support and the promotion of independence and self-reliance amongst individuals and communities

Depending on how it is used the **power and influence** of leaders and managers may have either a positive or negative effect upon relationships

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### Values

Adherence to codes of practice or conduct where applicable to your role and the principles and values that underpin your work setting, including the rights of children, young people and adults. These include the rights:

- To be treated as an individual
- To be treated equally and not be discriminated against
- To be respected
- To have privacy
- To be treated in a dignified way
- To be protected from danger and harm
- To be supported and cared for in a way that meets their needs, takes account of their choices and also protects them
- To communicate using their preferred methods of communication and language
- To access information about themselves

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